Samsung Business Reporting

V6

User Guide

Overview

This product is a purpose built software suite for the Samsung range of PBX's, it provides a complete communications management suite for all users of the system. Users are able to manage their desktop phones, view real-time and historical call data and record all external telephone calls.

The application collects all available data from the PBX without requiring any additional licensing.

Business Reporting

Call Management provides a real in-sight into how your business interacts with its customers and suppliers in real time using a configurable dashboard and reporting suite. A comprehensive range of standard reports is included which are designed to fulfil most organisation's requirements, with easy access to the database and the ability to save reports in several industry standard formats including Microsoft Excel.

It will allow you to see:

- How quickly an agent answers the telephone
- How many calls are lost
- Peak times for incoming and outgoing calls
- If your Network providers bill is accurate
- Whether your telecommunications network is functioning correctly and efficiently
- Whether you are using the most cost effective Network provider

The main Call Management application displays a Navigation menu on the left bar of the screen

We can select from the following menu items:

- My Reports
- Dashboard
- Call Recordings
- Reports Catalogue
- Configuration
- Help/Product Information

My Reports

This menu provides each user a list of their personal customised reports. Each time a user configures and run's a report they have the option to save the report parameters to enable the report to be run at a later date.
Each Call Management user has the ability to save their personal report templates, if they have access to the Reports Catalogue. All reports that the user has on an automatic schedule will also appear here.

Dashboard

The Dashboard is made up of Widgets. Widgets are configurable report components that enable users to view information in a concise fashion using a number of graphical components such as speedometers, thermometers, wallboards, charts and reports amongst others. Widgets can display real time information, or historical data.

The dashboard features a number of pre-set Widgets that offer c ustomers fast access to regularly used statistics and monitors.

Widgets are user configurable and are created from the reporting suite.

There are three main types of widgets-

- Standard widgets - These are available by default on the dashboard
- Enhanced widgets - These are available default when you have purchased the advanced pack
- Custom widgets - Created and defined by the end user for ad hoc reporting

Figure 1: Custom Dashboard

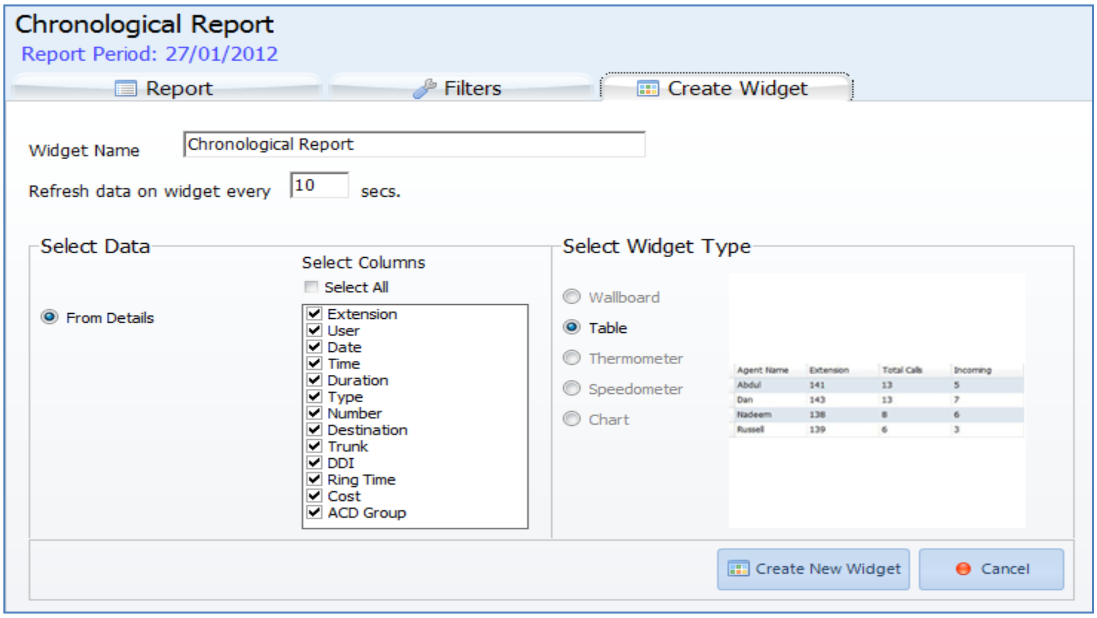
Standard Widgets

- PCA Monitor - Displays the percentage of calls answered
- Average Ring time Monitor - Displays average ring time
- Caller Tolerance - Displays caller tolerance in a tabular format
- Group Wallboard - Displays information of a group
- Agent Details - Displays detailed agent information
- Calls in queue - Displays the number of calls waiting in the queue
- Web Browser - Displays a web browser
- Top Agent - Displays the top agent by call and duration.
- Response Analysis - Displays information on calls answered in target, grade of service
- My Hourly Interval - Displays hourly call information
- My Daily Interval - Displays Daily call information
- Hourly Call Distribution - Displays the hourly call distribution in a chart format
- GoS Monitor - Displays Grade of service
- Extension Summary - Displays extension call summary
- DDI Grid - Displays a DDI call summary
- Calls Type Distribution - Displays Call information (outgoing, answered and unanswered) in a chart format

Custom Widgets

Custom Widgets are created by the user from their personalised reports. It allows the user to create a widget for a specific report. Users can select from a range of filters options and also select the widget type. This widget would then reflect on the dashboard and update in real time.

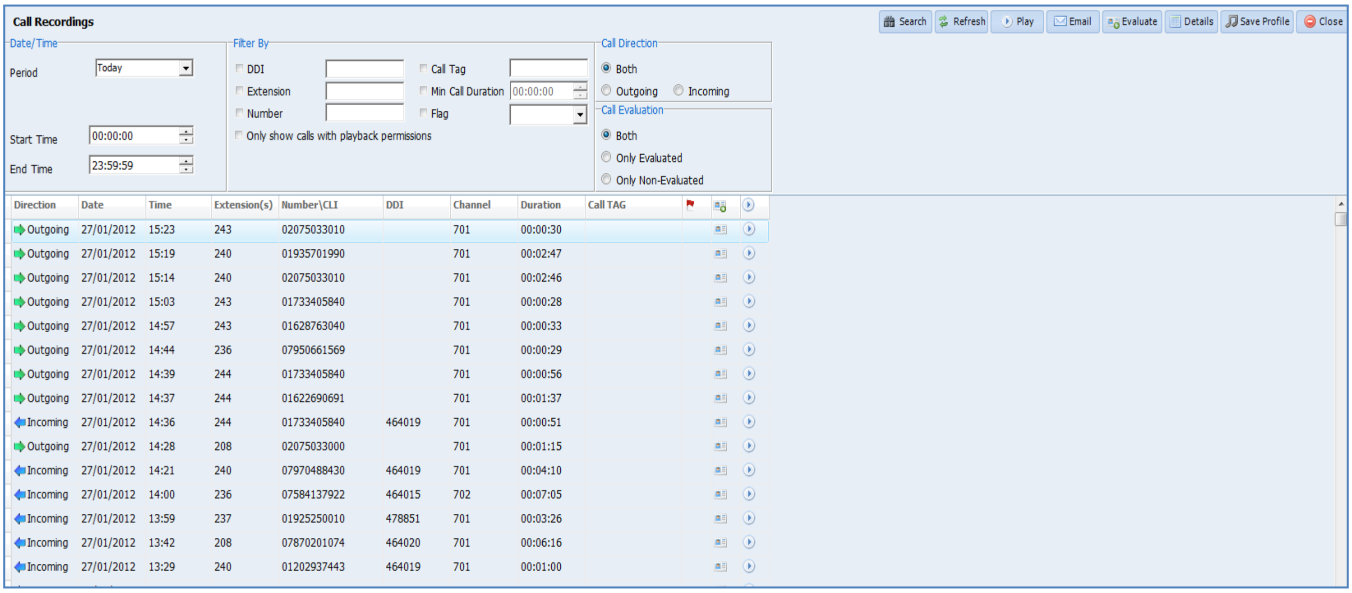
Figure 2: Custom Widget Creation



Call Recordings

This menu item is used to Find/Play call recordings & display historical calls or to filter call records for a specific date/time/call direction etc.

Figure 3: The Call Recordings



The Call Recordings screen displays the following stats in a tabular form:

- **Direction** - Displays direction of the call outgoing, incoming, etc.
- **Date** - Displays the date of the call
- **Time** - Displays the time of the call
- **Extension** - The extension that made or received the call
- **Number** - Displays the number that was dialled or received (a call made from a withheld number will not display any number)
- **DDI** - Displays the DDI number that received the call
- **Channel** - Displays the trunk / channel number that received the call
- **Duration** - Displays the duration of the call
- **Call Tag** - Free text field
- **Flags** - These are simple flags that can be defined by the user
- **Detail** - Displays the detail screen

Report Catalogue

The Report Catalogue is a repository of report templates that provide a starting point and recommended reports. All the reports can be customised by the user if there is a requirement for more specific reports.

Time Interval Reports

- Daily Interval - This report displays total calls for a period of 24 hours. The summary bar on top displays total calls, total answered, total missed, total outgoing and percentage.

- Half-Hourly Interval - This report further breaks down the period into 30 mins interval.
  The summary bar on top displays total calls, total answered, total, missed, total outgoing and percentage incoming. Filters tab provides a range of filters like extension, date, time, etc. The chart tab provides all the information in a chart format.

- Hourly Interval - This report displays information for a period of 60 mins intervals. The summary bar on top displays total calls, total answered, total missed, total outgoing and percentage incoming. Filters tab provides a range of filters like extension, date, time, etc. The chart tab provides all the information in a chart format.

- Monthly Interval - This report displays information on a monthly basis. The summary bar on top displays total calls, total answered, total missed, total outgoing and percentage incoming. Filters tab provides a range of filters like extension, date, time, etc. The chart tab provides all the information in a chart format.

Extension Reports

- Extension Detailed - This report displays a detailed activity of an extension. For an extension it gives the username, cost centre, division, total calls including incoming and outgoing. The summary bar on the top displays total calls, the total duration and total cost. Filters tab provides a range of filters like extension, date, time, etc.

- Extension Summary - This report gives a summary of calls (incoming and outgoing) for an extension. It also provides average talk time (incoming and outgoing), cost, etc. for all the extensions. The summary bar on the top displays total calls, total incoming, total outgoing and total missed calls. Filters tab provides a range of filters like extension, date, time, etc. The chart tab provides all the information in a chart format.

- Group Detailed - This report displays detailed activity information on extensions grouped by cost centre, department and divisions. The summary bar on the top displays total calls, the total duration and total cost. Filters tab provides a range of filters like extension, date, time, etc.

- Group Summary - This report gives a summary on extensions grouped by cost centre, department and divisions. The summary bar on the top displays total calls, total incoming, total outgoing and total missed calls. Filters tab provides a range of filters like extension, date, time, etc. The chart tab provides all the information in a chart format.

Call Traffic Reports

- Trunk Summary - This report gives information of how the trunk groups are being utilised. It is a summary of a trunk utilisation. It helps the user to analyse and identify if there are too many or too less trunk lines for the call volume. The chart tab gives a graphical analysis of trunk utilisation. Filters tab provides a range of filters like extension, date, time, etc.

Customer Reports

- Customer Detailed - This report displays detailed customer call information. The summary bar on the top displays total calls and duration. Filters tab provides a range of filters like extension, date, time, etc. The chart tab provides all the information in a chart format.

- Customer Summary - This report displays a summary of customer call information. The summary bar on the top displays total calls, total incoming, total incoming received and outgoing calls made to a particular customer. Filters tab provides a range of filters like extension, date, time, etc. The chart tab provides all the information in a chart format.

Contact Centre Reports

- ACD Group Summary - This report displays a summary of all the groups (for e.g. sales, support, accounts, etc.) for a particular day/ date range. It gives you information on the average ring time, call duration, total busy time, etc. for a group. The summary bar on the top provides total no. of calls, missed calls maximum waiting time and average ring time for all the groups together. Filters tab provides a range of filters like extension, date, time, etc. The chart tab provides all the information in a chart format.

Agent Workflow Analytics

- Availability Report - This report displays the information on how long the agent was logged in (available) to take calls, what is the required availability, etc. Filters tab provides a range of filters like extension, date, time, etc. The chart tab provides all the information in a chart format.

- Punctuality Report - This report displays information on the required start time of an agent and the actual start time to analyse how punctual an agent is. Filters tab provides a range of filters like extension, date, time etc.
- Status Detailed - This report displays detailed information on an agent’s status i.e. whether an agent is logged in or logged out with the reason code. Filters tab provides a range of filters like extension, date, time etc.

- Status Summary - This report displays a summary of an agent’s status in hours. Filters tab provides a range of filters like extension, date, time etc.

Incoming Call Analytics

- Caller Tolerance - It gives waiting time in seconds for customer and calls lost. It gives an insight on the peak times (ringtime in secs) for losing a call. Users could add a comfort message for customers at these peak times and cut down on their lost calls.

- DDI Detailed - This report displays detailed call information on each DDI for a specific day. Filter tab provides a range of filters like date/time range, extension range etc.

- DDI Summary - This report displays a summary of total calls on each of the DDI for a specific day range. Filters tab provides a range of filters like extension, date, time, etc. The chart tab provides all the information in a chart format.

- Performance Detailed - This report displays the detailed DDI information and the longest ring time in the summary bar to show how long a call was waiting in the queue. Filters tab provides a range of filters like extension, date, time etc.

- Performance Summary - This report displays the call information for a period and the number of calls answered in target, grade of service etc. Filters tab provides a range of filters like extension, date, time, etc. The chart tab provides all the information in a chart format.

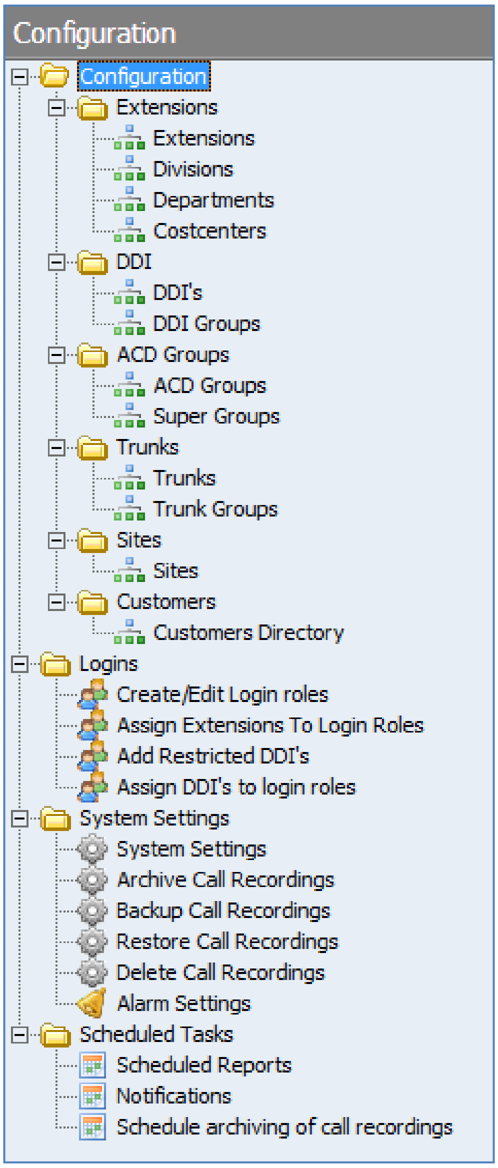
- Response Analysis - This report shows information for hourly intervals and if the calls are

answered within the target response time or not. The target response time can be changed in Configuration.

Other Reports

- Call Destination - Displays call information by Destination
- Calls by Area - Displays call information by area code
- Top Calls by Cost - Displays the maximum call cost
- Top Calls by Duration- Displays the maximum call duration

Configuration



Within Configuration you can configure the following settings:-

- Extensions
- DDI
- ACD Groups
- Trunks
- Sites
- Customers
- Logins
- System Setting's
- Scheduled Tasks

Note: For a fast and successful installation we recommend that you complete all parts of the configuration, using data collected from the pre installation questionnaire, prior to customer training and handover.

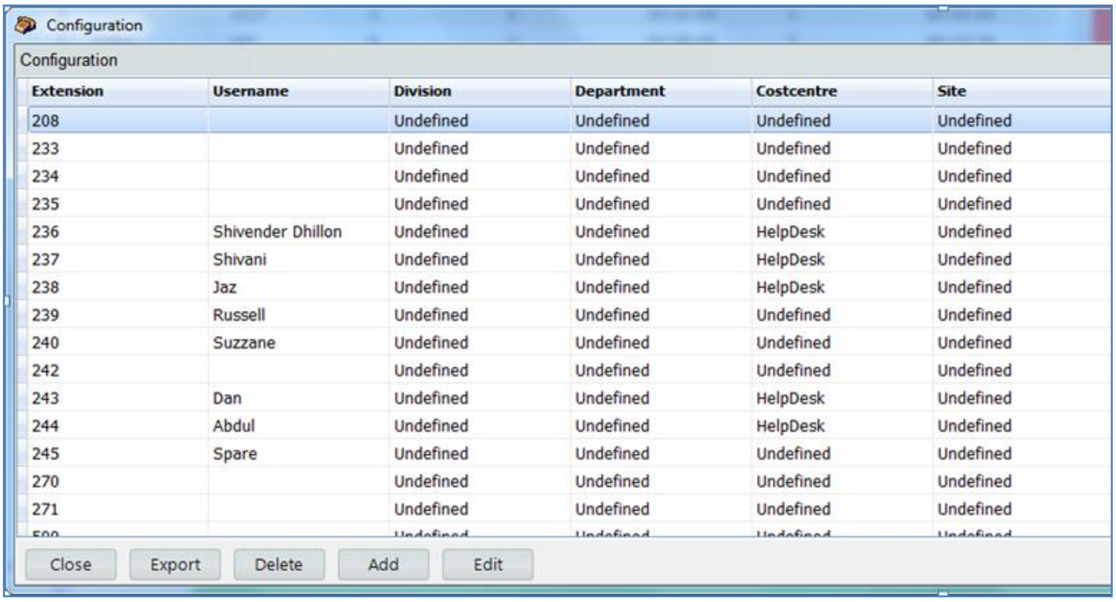
Figure 4: Configuration

The data that Call Management uses is a combination of SMDR and ACD outputs from the Call Management MFIM. These outputs must be configured correctly for CALL MANAGEMENT to receive the information it requires.

Configuring Extensions

Users can add, edit, delete or export the Call Management configured extensions using the tabs provided. Close tab closes down the configuration window.
Administration Users can add username division, department, cost centres, site, email address, start time, average availability time and type for a particular extension.

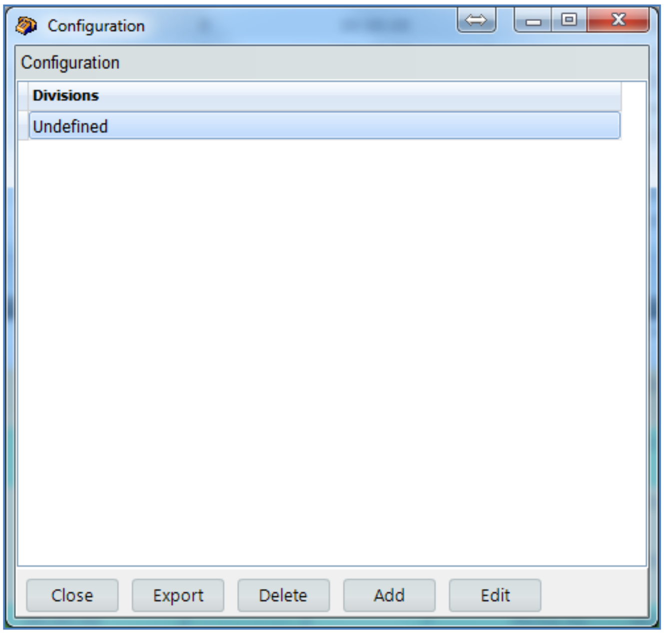
Figure5 : Extension configuration



Extension	Username	Division	Department	Costcentre	Site
208		Undefined	Undefined	Undefined	Undefined
233		Undefined	Undefined	Undefined	Undefined
234		Undefined	Undefined	Undefined	Undefined
235		Undefined	Undefined	Undefined	Undefined
236	Shivender Dhillon	Undefined	Undefined	HelpDesk	Undefined
237	Shivani	Undefined	Undefined	HelpDesk	Undefined
238	Jaz	Undefined	Undefined	HelpDesk	Undefined
239	Russell	Undefined	Undefined	Undefined	Undefined
240	Suzzane	Undefined	Undefined	Undefined	Undefined
242		Undefined	Undefined	Undefined	Undefined
243	Dan	Undefined	Undefined	HelpDesk	Undefined
244	Abdul	Undefined	Undefined	HelpDesk	Undefined
245	Spare	Undefined	Undefined	Undefined	Undefined
270		Undefined	Undefined	Undefined	Undefined
271		Undefined	Undefined	Undefined	Undefined

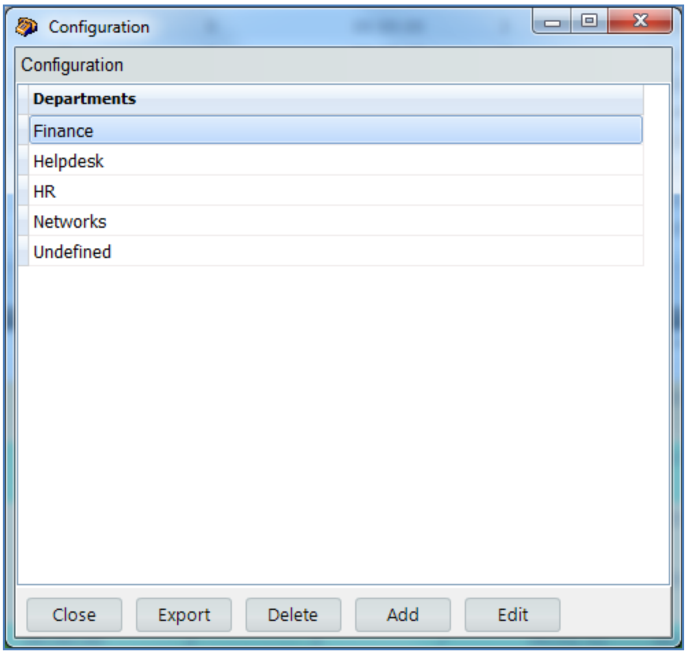
Administration users can add, edit, delete or export the Divisions using the tabs provided. Close tab closes down the configuration window.

Figure 6 : Division Configuration



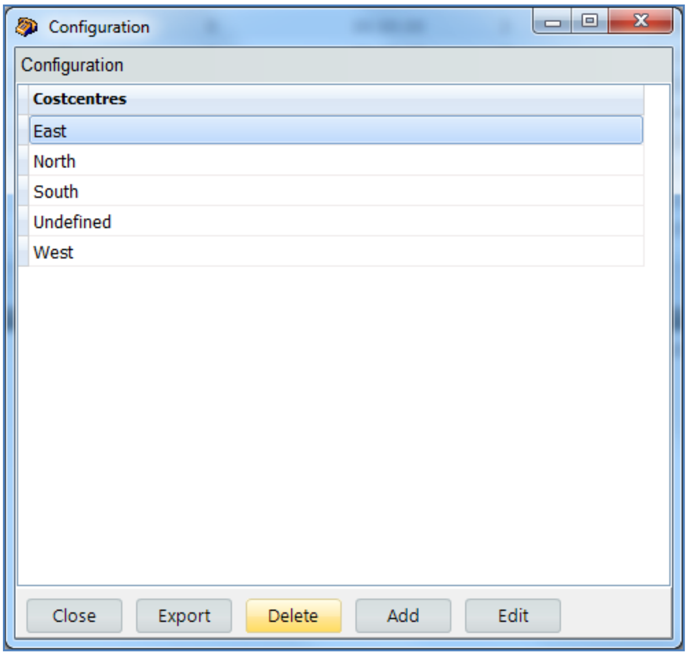
Administration Users can add, edit, delete or export the Departments using the tabs provided. Close tab closes down the configuration window

Figure 6 : Department configuration



Administration Users can add, edit, delete or export the cost centres using the tabs provided. Close tab closes down the configuration window

Figure 7 : Cost Centres Configuration

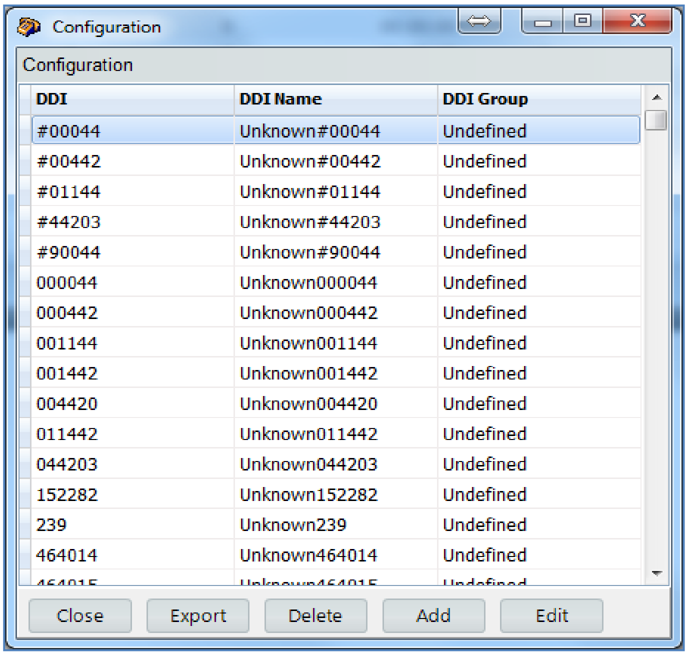


DDI's

Configuring DDI's

User can add, edit, delete or export the DDI's using the tabs provided. Close tab closes down the configuration window. User can add DDI, DDI Name and DDI Group for each DDI.

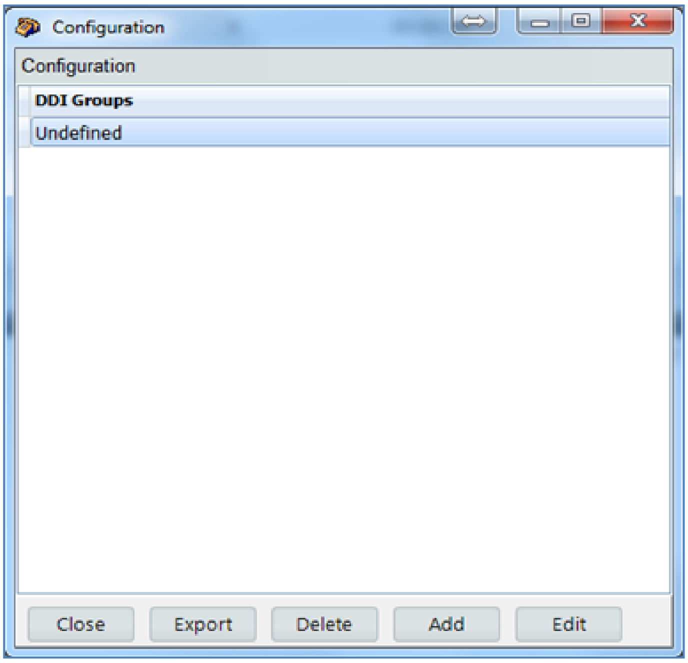
Figure 8: DDI Configuration



DDI Groups

User can add, edit, delete or export the DDI Groups using the tabs provided. Close tab closes down the configuration window.

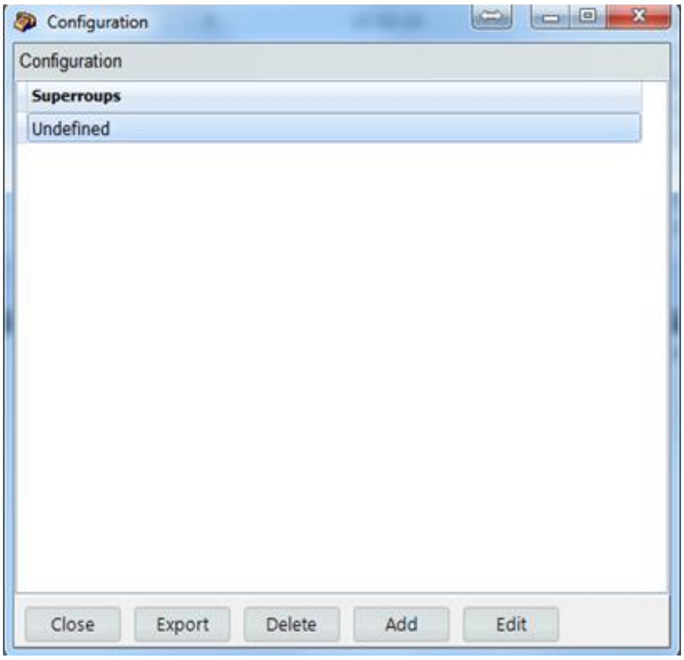
Figure 9: DDI Group Configuration



Super Group

User can add, edit, delete or export the ACD Super Groups using the tabs provided. Close tab closes down the configuration window.

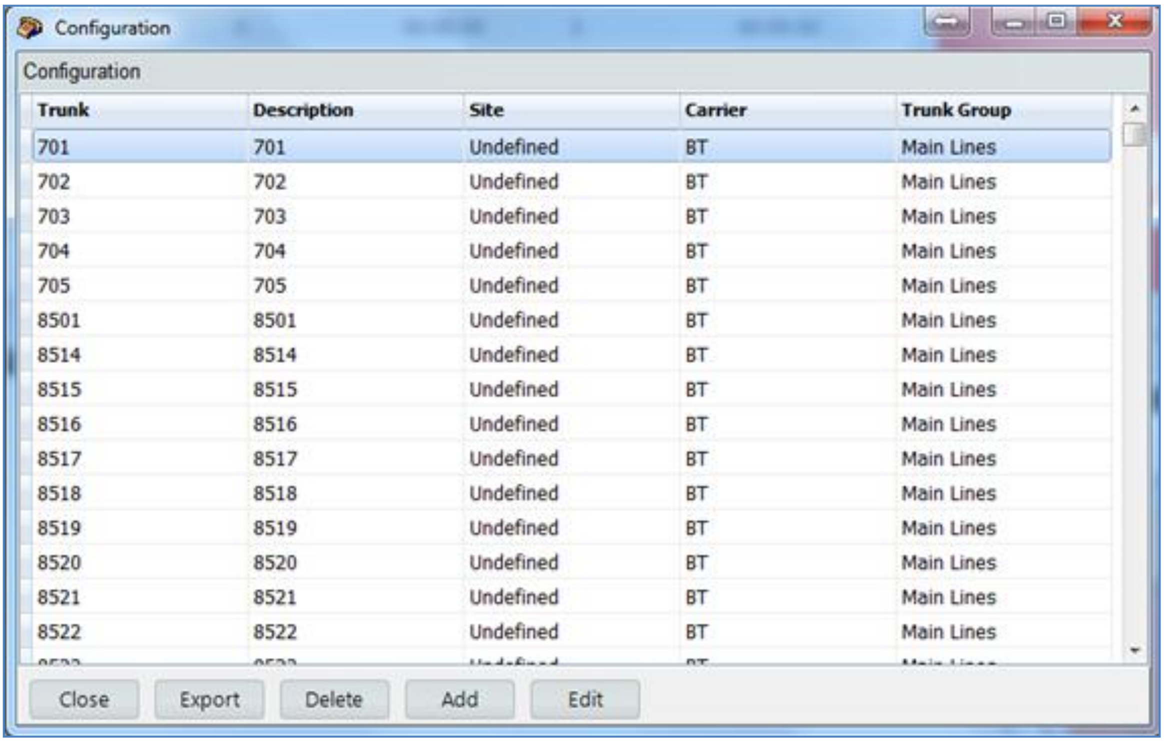
Figure 1 0 : Super Group Configuration



Trunks

User can add, edit, delete or export the Trunks using the tabs provided. Close tab closes down the configuration window. User can add trunk, trunk name in description, site name, carrier and a trunk group.

Figure 1 1 : Trunk Configuration

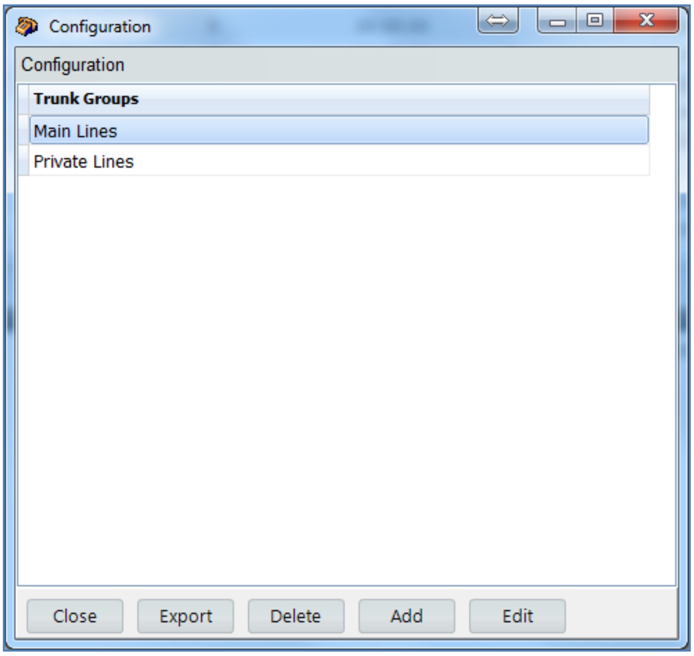


Trunk	Description	Site	Carrier	Trunk Group
701	701	Undefined	BT	Main Lines
702	702	Undefined	BT	Main Lines
703	703	Undefined	BT	Main Lines
704	704	Undefined	BT	Main Lines
705	705	Undefined	BT	Main Lines
8501	8501	Undefined	BT	Main Lines
8514	8514	Undefined	BT	Main Lines
8515	8515	Undefined	BT	Main Lines
8516	8516	Undefined	BT	Main Lines
8517	8517	Undefined	BT	Main Lines
8518	8518	Undefined	BT	Main Lines
8519	8519	Undefined	BT	Main Lines
8520	8520	Undefined	BT	Main Lines
8521	8521	Undefined	BT	Main Lines
8522	8522	Undefined	BT	Main Lines

Trunk Groups

User can add, edit, delete or export the Trunk Groups using the tabs provided. Close tab closes down the configuration window.

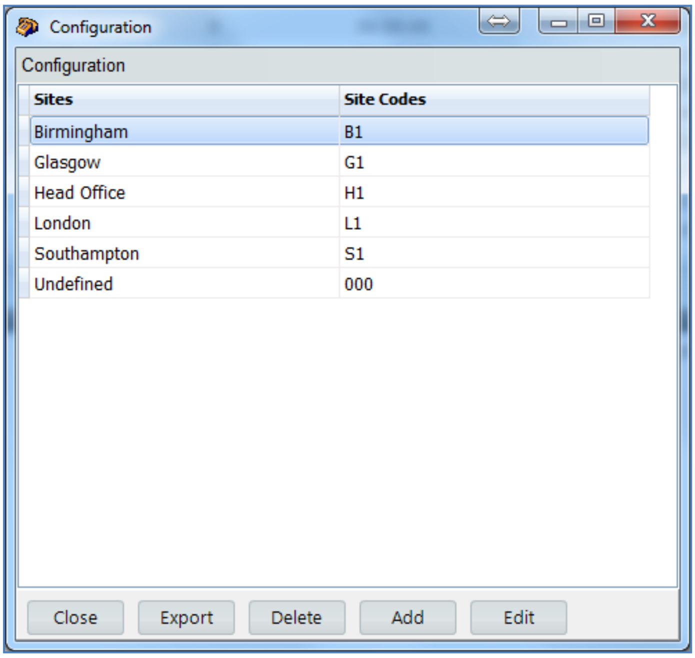
Figure 1 2 : Trunk Group Configuration



Sites

User can add, edit, delete or export the Sites using the tabs provided. Close tab closes down the configuration window.

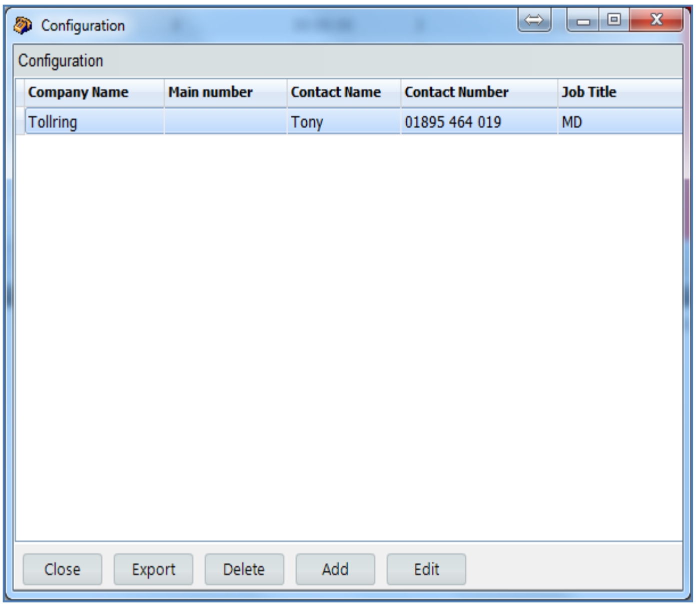
Figure 1 3 : Sites Configuration



Customer Directory

Managers can add, edit, delete, export and import the Customer Directory using the tabs provided. Close tab closes down the configuration window. User can add company name, number, contact name, contact number and job title for each customer.

Figure 14: Customer Directory Configuration



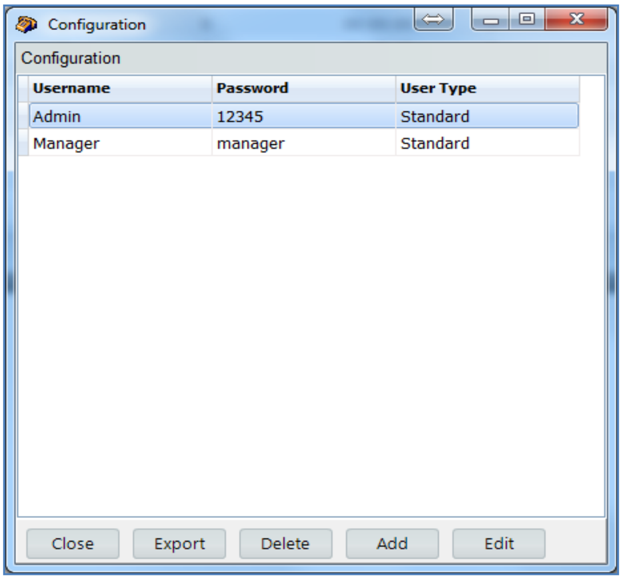
Logins

This function allows you to setup user accounts for the system. User accounts are not required for the Phone Manager or Busy Lamp Viewer applications.

User accounts are used throughout the system to;

- Provide access to the Call Management interface
- Define the level of access a user has to reports

Figure 15: Log-in Credentials Configuration



There are two user types:

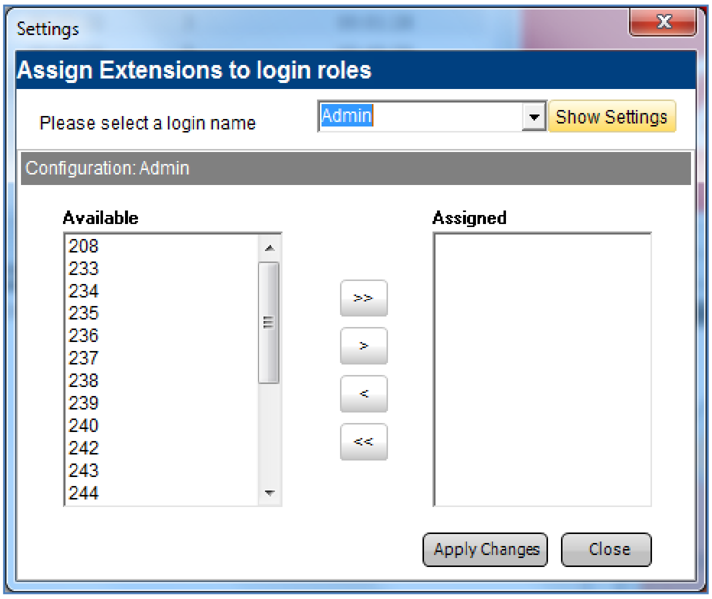
- Administrator – this setting allows unfettered access to the system software allowing user to make all changes to the system.
- Standard User – this setting allows full access to system except to change any configuration settings or permissions.

Assign extensions to login roles

Once you have setup agent accounts within the software you can using this function specify which User can listen to calls from which extensions you assign to them.

All you need to do is select the Login name and click on show then using the arrow buttons assign which extensions you wish the user to be able to play calls from and when done click on apply changes.

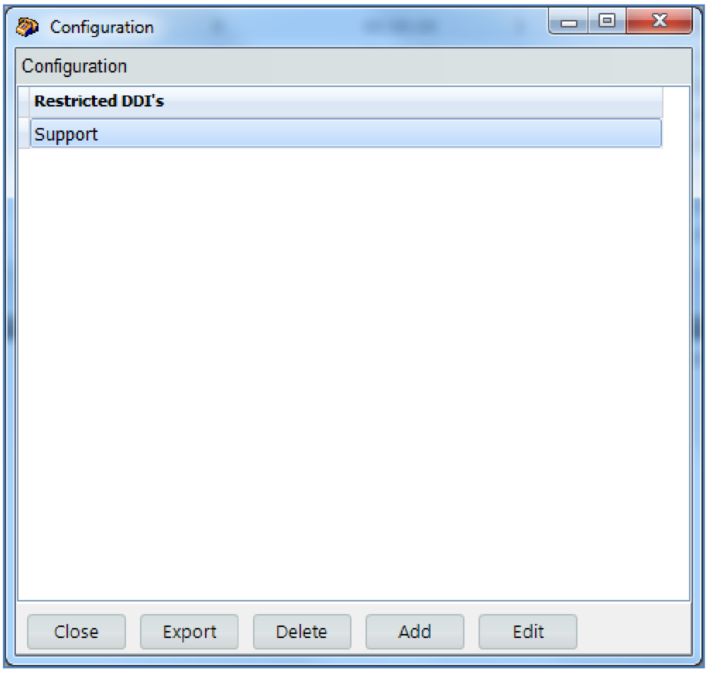
Figure 16: Assign Extensions to Log-ins Configuration



Add restricted DDI's

This function allows you to block access specific DDI's from the telephone system, if specified nobody will be able to listen to calls made / received on that DDI unless specific rights are granted.

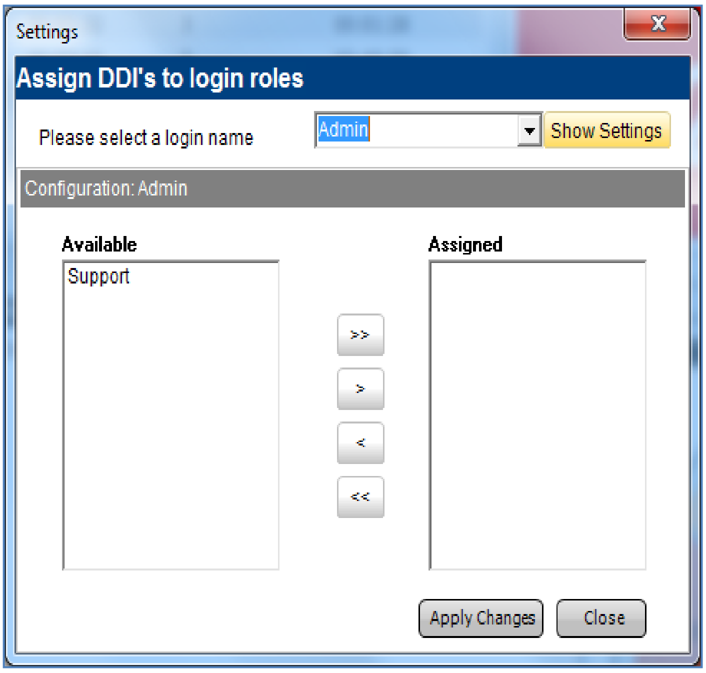
Figure 17: Restricting DDI's Configuration



Assign DDI's to login roles

This Function allows you to give user's access to Restricted DDI's i.e. you have restricted access to the MD's DDI with this function you can give rights to listen to those calls only to your MD.

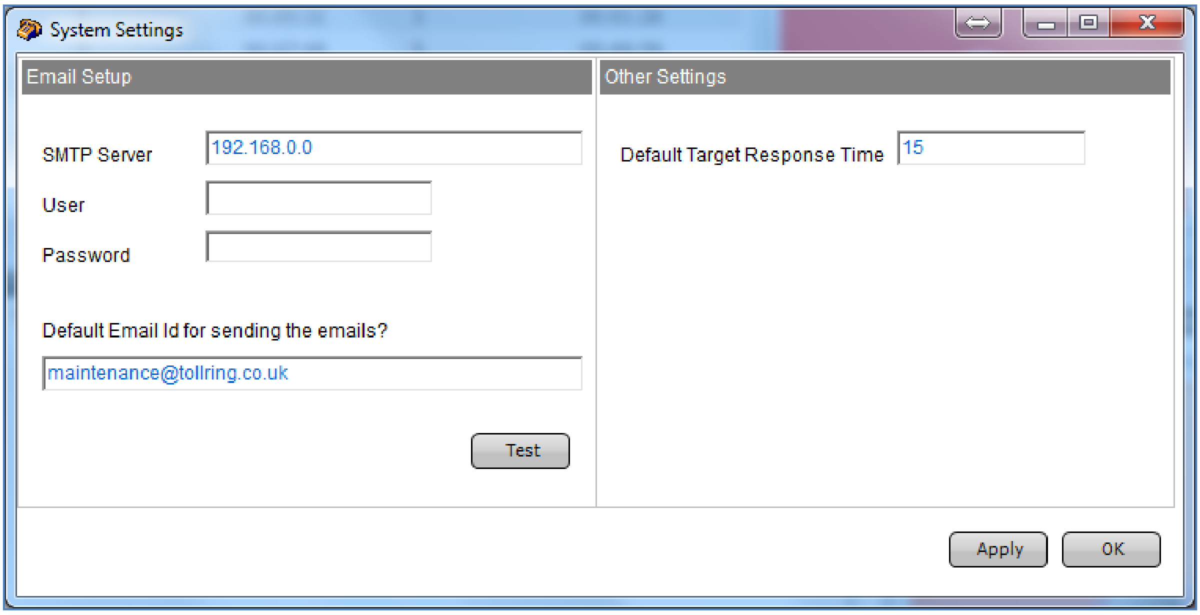
Figure 18: Assign DDI's to log-ins Configuration



System Settings

This function allows the user to add their email account details to send out call recordings and reports.

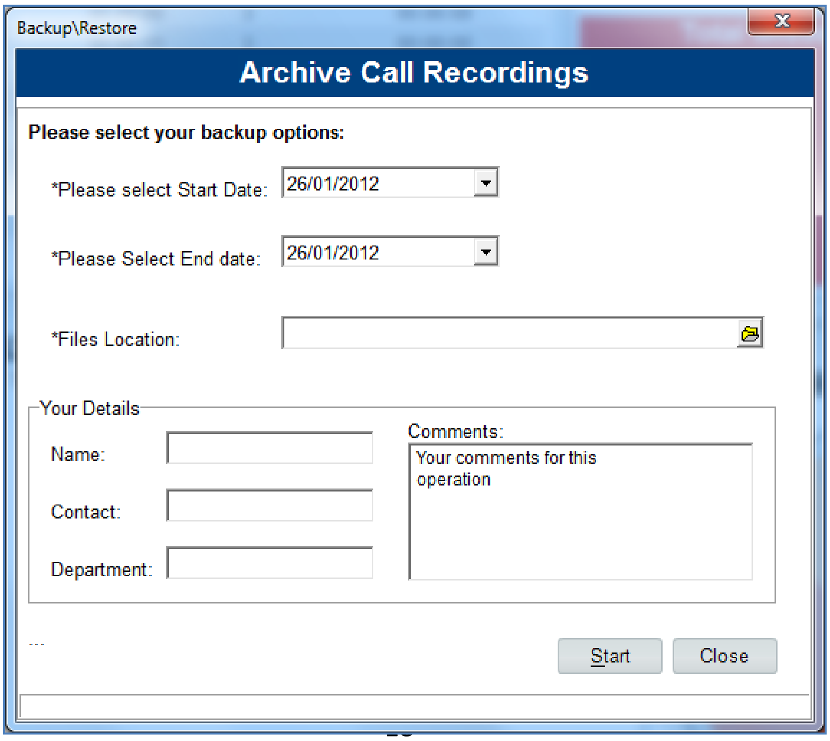
Figure 19: System Settings Configuration



Archive Call Recordings

This function gives user the ability to archive call recording data for a specific date range to free up space on the hard drive of the call recording machine by archiving data off to another drive or network location.

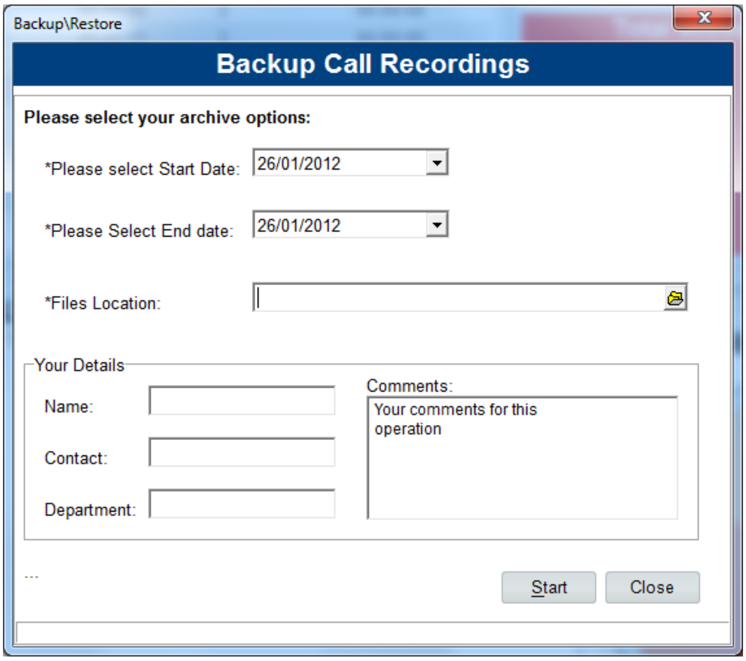
Figure 20: Archiving Call Configuration



Backup Call Recordings

This function gives user the ability to backup call recording data for a specific date range by making a backup copy of data on another drive or network location this will not free up space on the recording machine hard drive.

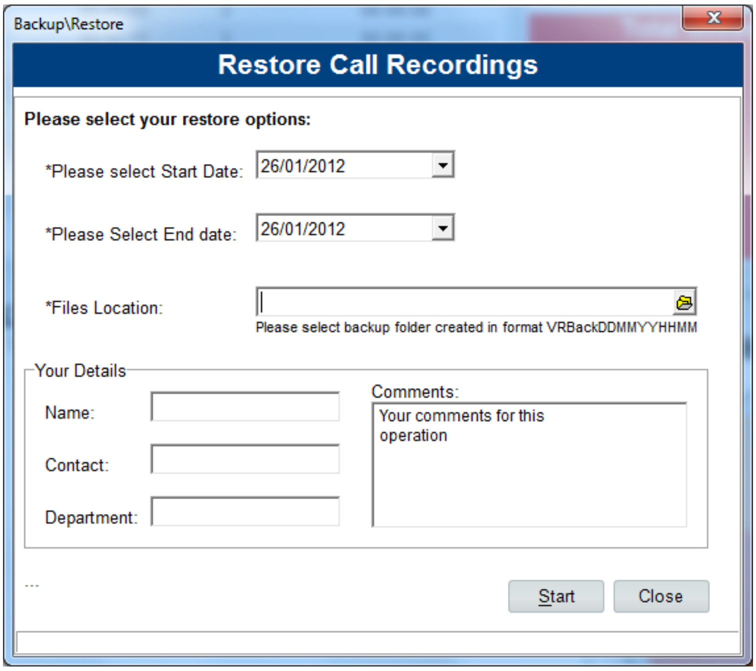
Figure 2 1 : Back Up Call Recording Configuration



Restore Call Recordings

This function gives user the ability to restore call recording data for a specific date range and archive file back into the system.

Figure 2 2 : Restore Call Recording Configuration

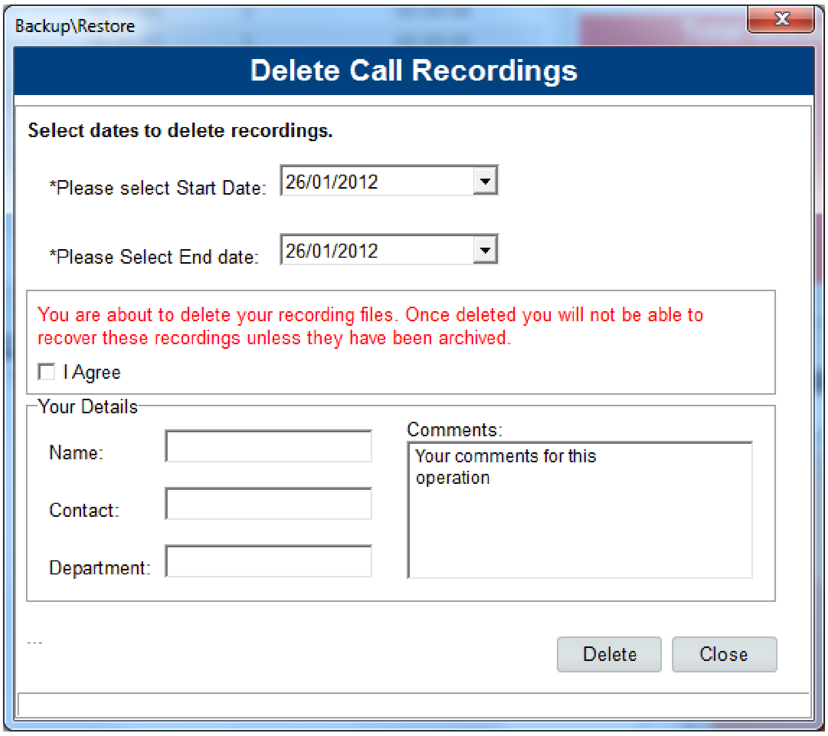


Delete call Recordings

This function allows the user to delete call recording from the system for a specific date range

Important: Once deleted unless you have backed up or archived the data you will not be able to recover the data.

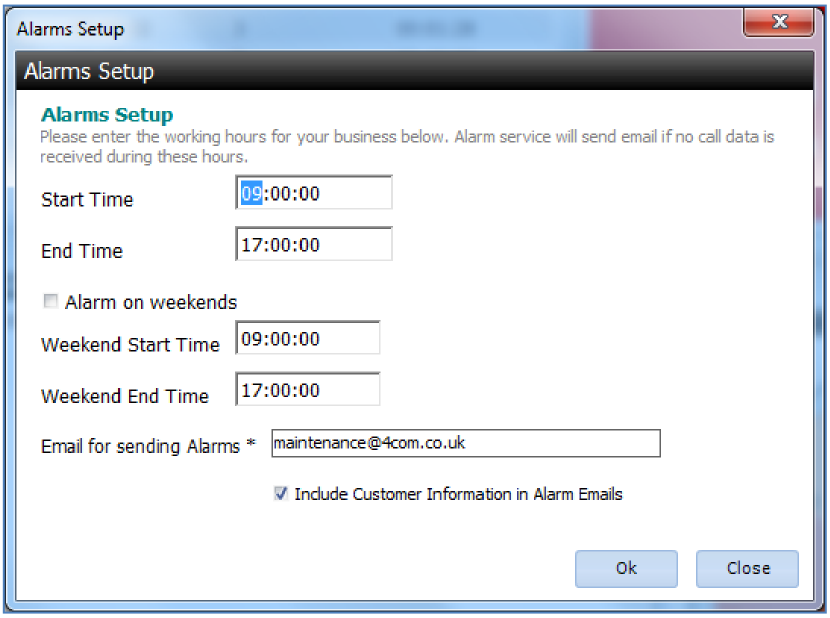
Figure 23: Delete Call Recordings Configuration



Alarm Settings

User can set the system to send alarm emails to a specified email address if the system stops recording. The user can set the operation hours in minutes after midnight.

Figure 24: Alarm Set-up Configuration

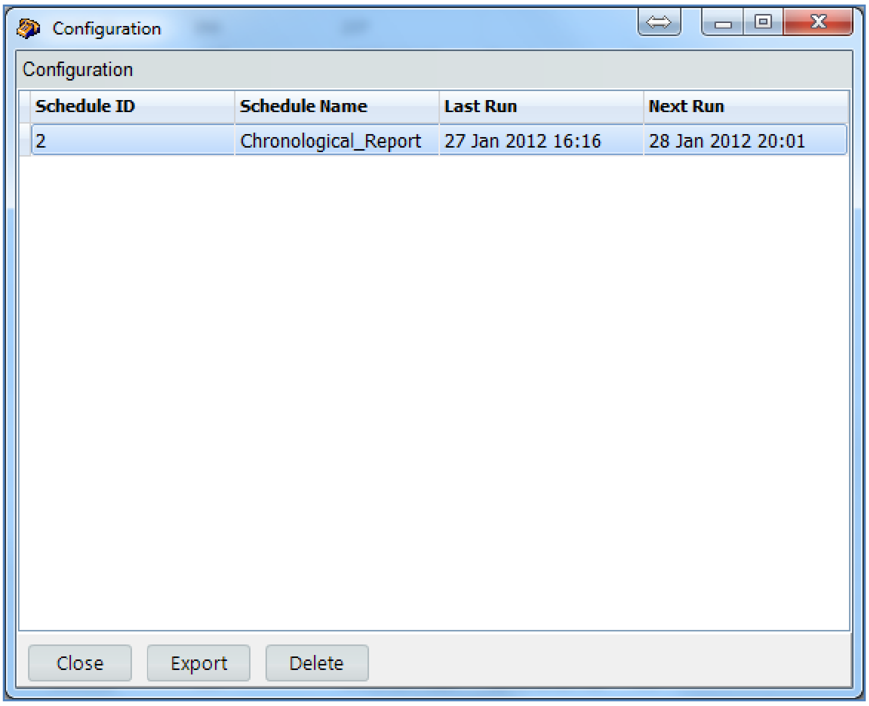


Scheduled Tasks

Scheduled Reports

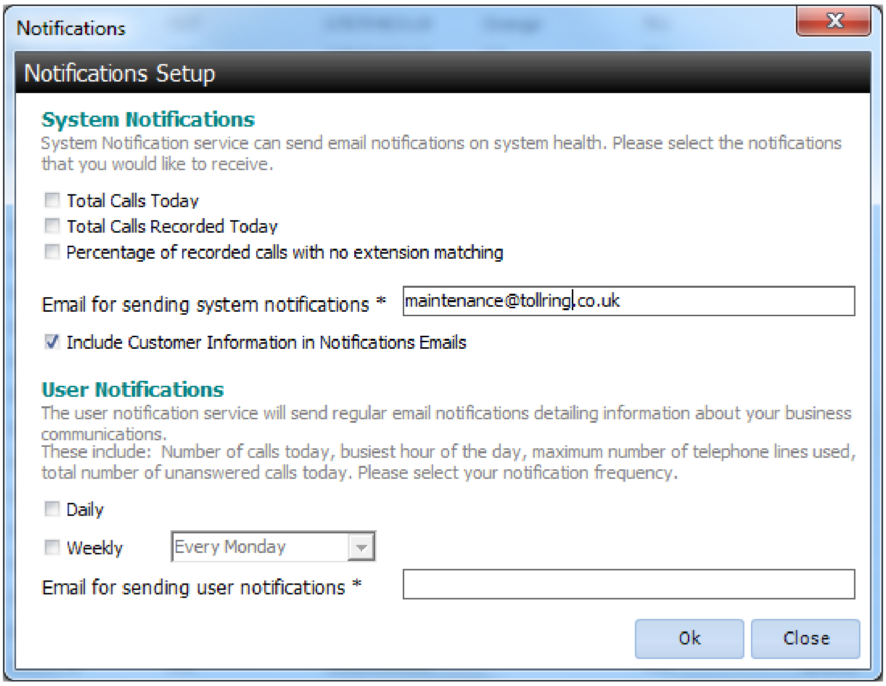
This function allows the user to schedule reports to be sent out daily, weekly or monthly.

Figure 24: Alarm Set-up Configuration



Notification Set-up

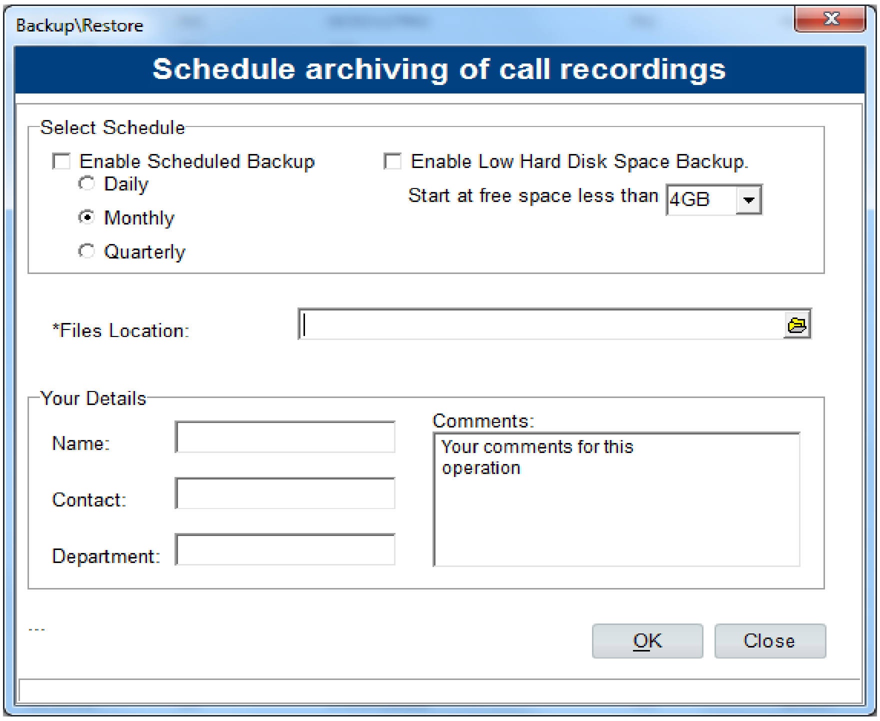
Figure 25: Notification Configuration



Schedule archiving of call recordings

This function allows the user to schedule the system to archive data daily, monthly or quarterly or just when the system hard drive is about to get full.

Figure 2 6 : Notification Configuration



Client Requirements

The Call Management Client needs to be either connected to the same LAN as the Call Management server and Call Management telephone system, or connected to the Internet from a remote location with a route back to the Call Management Server and Call Management telephone system using a static IP address.

Using Call Management

Call Management is an intuitive application to use, and you will find that the learning curve allows for users to become familiar and comfortable with the software quickly.

The Call Management Application can be accessed from the short cut on the desktop.

This is the part of Call Management that has been designed for Managers and Business Owners to monitor, analyse and review data from agent and call activity.

Using the Dashboard

Locking the dashboard

You may wish to 'lock' the dashboard if you are using the dashboard on a large screen to act as a contact centre wallboard. Locking has the effect of removing the resize and close options from all widgets and locking them in place on the dashboard.

Right clicking anywhere on the dashboard will show the locking and caption control dialogue.

Widget Captions

Widgets are individually named, system widgets have a set name and custom widgets can be given a name when they are created.

Resizing widgets

Widgets can be resized

Creating custom widgets

Custom widgets are created by users in the following way:

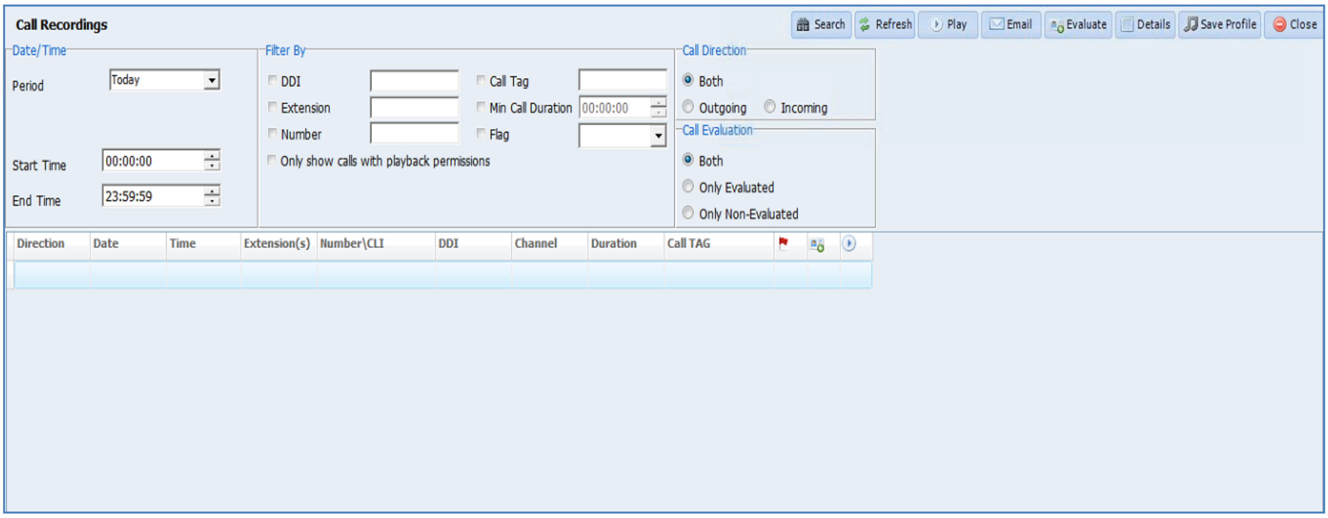
- Choose a report template that will form the basis of the widget
- Customise the report using filters to get the information you want to display in the widget
- Refresh the report using the 'Refresh Report' button on the top toolbar
- Choose 'Create Widget'
- Add your own name for the widget
- Modify the parameters depending on the details you want to show
- Click 'save widget
- A message will inform you if the widget has been successfully added to the dashboard

Figure 27: Report/Widget Configuration

Using Call Recordings

This menu item is used to display historical calls or to filter call records for a specific date/time/call direction, etc.

Figure 2 8 : Find/Play Call Recordings



The Call Recordings screen displays the following stats in a tabular form:

- Direction - Displays direction of the call – outgoing, incoming, etc.
- Date - Displays the date of the call
- Time - Displays the time of the call
- Extension - The extension that made or received the call
- Number - Displays the number that was dialled or received (a call made from a withheld number will not display any number)
- DDI - Displays the DDI number that received the call
- Channel - Displays the trunk / channel number that received the call
- Duration - Displays the duration of the call
- Call Tag - It is a free text field
- Flags - These are simple flags that can be defined by the user
- Detail - Displays the detail screen

Any of these columns can be sorted in order, by clicking on the title, e.g. click on call time to order stats by time, click on 'ext' to order the stats by extension.

The left side menu gives us the following filter options:

- Date and time range - Select date and start / end time
- Call evaluation - We can select all evaluated, all non-evaluated calls or all calls
- Call direction - We can select only outgoing calls, only incoming calls or both
- Filter by - His is an additional filter by DDI, Extension, Call Tag, Number or Flag

Only show calls with playback permissions will display calls that the user is allowed to listen to. After selecting the filter options click Run to display the desired calls.

There are additional buttons at the end of the call finder screen:

- Refresh - will refresh the page and update it with the latest call information
- Play - will play the selected call
- Email - Will email the selected recording

Using the Report Catalogue

The top tab options are common to all reports:

- Refresh Report - Refreshes the report with up to the minute data
- Create widget - Allows you to create a dashboard widget for a specific report. You can select from a range of filters options and also select the widget type. This widget is then available in your dashboard widget list.
- Add to My Reports - Adds the report to 'my reports'.
- Print - Prints out the report.
- eMail - emails the selected report.
- Save - Saves the selected report in the desired format.

Evaluating Agents

Only available with the Call Recording upgrade and advanced pack

Calls and Agents can be evaluated by Manager's using the integrated evaluation tool, which can be found on the bottom control bar when the product is displaying the Call Finder screen. Evaluation questions can be changed by clicking on the question text. You have the choice of 'yes/no' or a rating from 1 to 10.

We strongly recommend that questions are setup prior to any real evaluations taking place as changes to questions will reset the agent scoring statistics (for that question only).

Call Details

This displays the call result (complaint, sales, etc), customer feedback (type of call), call flag, call tag, the DDI, number and extension number. The call result and customer feedback types can be defined in the configuration